Managed Wealth Services

Within our planning approach, you and your Wealth Advisor will review your personal and financial information and identify your: financial goals, tolerance for risk, and time horizon. Following that, we conduct a comprehensive financial analysis utilizing sophisticated financial planning technology. Our planning services are detailed below. All plans include a custom road map with shared action items to guide our steps over the course of the year.

	Planning Advantage	Executive Advantage
Comprehensive summary of your financial picture including an extended cash flow analysis, retirement analysis, tax optimization strategies, and net worth summary	✓	✓
Analysis of your investment portfolio including a 401(k) investment recommendation	✓	✓
Risk analysis and review of insurance coverages and needs	✓	✓
Opportunity for management of your investments tailored to your needs, goals, and risk tolerance	✓	✓
Online financial plan where you can review current outcomes and perform your own what-if scenarios and get instant results	✓	✓
Secure online document vault where you can access the current plan and future reports	✓	✓
Basic estate plan review and beneficiary designation review	✓	✓
Advanced estate planning with a focus towards inheritance planning and charitable giving	☐	✓
Employee benefits and corporate deferred compensation planning	☐	✓
Comprehensive portfolio overview with recommendations on ways to improve your retirement account allocation within corporate constraints	☐	✓
Written portfolio analysis for each of your accounts	☐	✓

Note: For clients best served with an every other year plan and investment review, we offer a Planning Advantage II option.

Once the financial planning process is complete, you and your Wealth Advisor will meet and review our recommended strategies toward your long-term risk and return goals. Investments are researched and selected by the Vantage Investment Committee and represent some of the most respected Investment Managers in the industry. The portfolios are broadly diversified to take advantage of developing opportunities while minimizing the impact of any one investment within your portfolio. Portfolios may include alternative investments designed to help reduce portfolio risk. In certain situations, some clients may be eligible to receive additional investment management expertise based on the size of their accounts.